

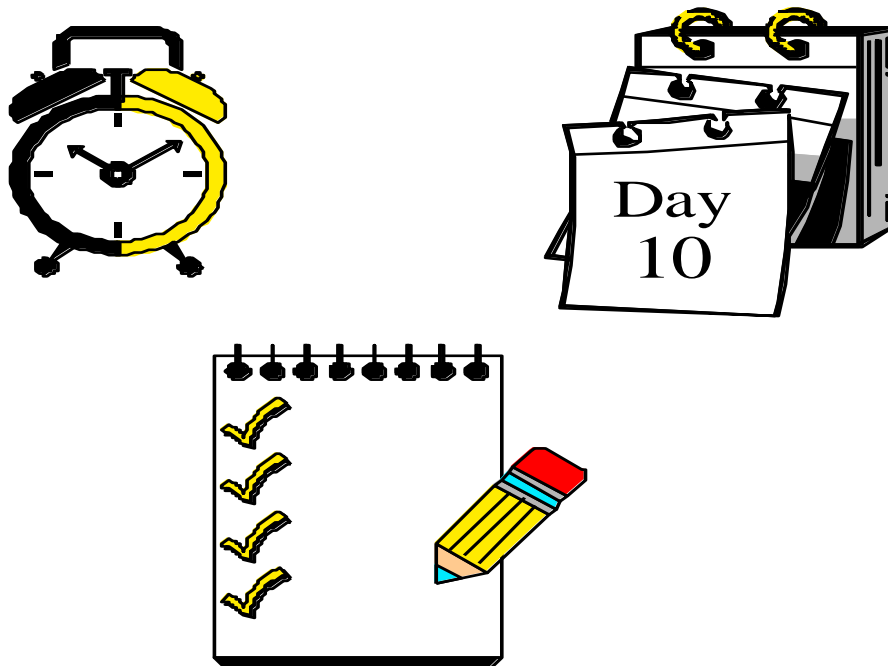
MAINTENANCE

Caseload Management Screens

Client History Screens

Notes Process

Document Generation Process



MA-02

- Alerts will be a handy tool for managing the needs of a case
 - Check your ALER screen frequently

ALER – Alerts

```

CAFSALER                ALERTS                05/28/2008    15:32
USER ID : C74142SW                PAGE NO: 19    MORE

SEL - TO SELECT, ENTER S=SELECT, M=MODIFY, D=DELETE (USER ONLY) OR A=ADD ---
- CODE:          ID#:          TYPE:          DELETABLE:
  DUE DATE:          ACTIVE DATE:          SCREEN:          ALERT TEXT:

-----
DSPLY ALRT TYP(C,P,R,W):          ID#:          VIEW ALRTS FOR USER: C74142SW
TO SELECT, ENTER S=SELECT, D=DELETE (USER ONLY) OR I=INQUIRE

SEL  CODE    DATE    TYP  ID #    NAME
-   W01007  01/15/08  C 00001347  SECURITY, JANE
      WORKER C82123  HAS ACCESSED SECURED CLIENT      1347
-   S02005  01/03/08  C 00001440  WILSON, MARLENE
      FCRC DUE 01/03/2008
-   S05001  01/03/08  C 00001433  HENNINGSON, BRYSON
      CHILD SUPPORT REFERRAL MUST BE DONE BY 04/02/2008
-   C01011  01/02/08  C 00001002  HOLLING, KYLE F
      IV-E FINDINGS ARE DUE FOR CAPS ID 00001002 ON 03/02/2008.
-   S02015  01/01/08  C 00001306  IVE, NAOMI
      ANNUAL HOME VISIT DUE NO LATER THAN 01/01/2008

                                           PATH: █
  
```

- The alert screen displays messages that have been created by the system or by the worker, pertaining to the worker's cases
 - To view the entire alert, select it with an (I) to display at the top half of the screen
- Alerts are triggered by events, due dates and errors. Examples of alerts are:
 - Notify the worker of an upcoming review date
 - Notify the worker that certain eligibility information needs to be completed
 - Notify the worker of an upcoming court date
 - Notify the worker of required foster care visits
 - Notify the worker that payment approval over 5 days old
- An alert will remain until a required action is taken, then CAPS or the worker will delete it by typing a "D" on the select line
 - If the alert is not a deletable alert, the worker must select it with an "S" - the worker will be taken to the appropriate screen to take action on that alert
- Each alert will be displayed at a pre-set number of days prior to the due date as defined in the Code Table
- Due dates are defined on the Alerts Code Table which is maintained by Central Office

- To create an alert, the worker will, enter an “A” in the select field, at the top of the screen, and all of the information needed pertaining to the type of alert that you are trying to create
- To DELETE an alert, enter a “D” at the appropriate line and press ENTER
 - You may delete alerts that you have created yourself and certain system generated alerts that have been defined as deletable
- To limit the alerts that are viewed, a worker may indicate the alert type (C, P, R, W) or type in the ID of the Client, Provider/Payment, Report or any Worker generated alerts

AKAD - Person Name AKA Detail

```
CAFSKAD          PERSON NAME AKA DETAIL          06/20/2006   14:45
USER ID : CS4566  MODIFY                          PAGE NO :    1
CAPS ID : 00002084  25    NAME : FURST, EVE
----- LAST ----- -- FIRST --- -- MIDDLE --  SUFX
DECLARED PERSON NAME : FURST                      EVE
MAIDEN NAME          :
LEGAL NAME           :

  OPTIONS - _  CHANGE DECLARED PERSON NAME(DPN) & MOVE OLD DPN TO AKA
             _  CHANGE SPELLING OF LEGAL NAME
             _  CHANGE LEGAL NAME & MOVE OLD LEGAL NAME TO AKA

TO SELECT, ENTER A=ADD, D=DELETE, M=MODIFY
SEL ----- LAST ----- -- FIRST --- -- MIDDLE --  SUFX  MIND  COMMENTS
_  WASHINGTON          EVE                      N
_
_
_

PATH: █
```

- This screen is used to ADD and MODIFY person name information for any names the person may use in the system
- Each person has a DECLARED PERSON NAME - the first one entered on CAPS
- Select which action you wish to perform from the OPTIONS list
 - Change DECLARED NAME and move old name to the AKA list at the bottom of the screen
 - Change the spelling of the LEGAL NAME
 - Change LEGAL NAME and move old legal name to AKA
- Enter select information at the bottom of the screen to ADD alias names for the specified person
- CCUBS NAME will only be displayed for names that were selected by a CAPS licensing worker through the resolution process. They are additional names known to the CCUBS system.

AXED - Assignment/Transfers Detail

```
CAFSAXED          ASSIGNMENTS/TRANSFERS DETAIL      06/20/2006   14:46
USER ID : C86100

ENTER ENTITY TYPE BEING PROCESSED
(C-CLIENT,F-FACILITY,P-PERSON OR R-REPORT): C
PROCESSING CLIENT   : 0002084
NAME : FURST, EVE

FUNCTION : T (ENTER A=ASSIGN, T=TRANSFER,
              R=READ ONLY, S=SHARE, P=SECURE)

FROM USER : C86100   KOENIG, KELLY
TO USER   : CS4566   REYNOLDS, MARY

TYPE      : P (T=TEMPORARY, P=PERMANENT)

ENTER START DATE OF TRANSFER
OR CLIENT EFFECTIVE DATE: 06/20/2006
END DATE: 99/99/9999

IS THIS A PRIVATE ADOPTION AGENCY CLIENT (Y/N)? : N

FS900354 TO CONFIRM, PRESS F16(SHIFT+F4) . PATH: █
```

- This screen is used to assign a client to a worker, to permit another worker to share a client and to grant temporary read only access
- The process of assigning a person to a worker makes the person a client
 - Assign a person to a worker
 - Assign a client to a worker
 - Assign a closed client to a worker
 - Supervisor can assign a client to a worker
 - A worker can assign clients to their own caseload
- The F10 key allows you to select other persons from RELL (Relationship List) screen so multiple persons can be assigned to a worker at one time
- Assignments and Transfers
 - TRANSFERS - This grants permanent/or temporary access to another worker for a client, facility or report
 - SHARED ACCESS - This grants shared permanent/temporary write access of a client to multiple users at one time

- + To terminate shared access a R (Release) is performed on the CSLL (Caseload List) screen of the worker with shared access
 - READ ONLY - This grants temporary read only access with an expiration date no greater than five days
 - + You have to enter a START DATE and an END DATE
 - SECURE - This allows you to secure client information so you are the only worker who has access to the client who has been secured
- When a transfer occurs, an event record is created and stored in the system
- Alerts:
- When a client is assigned to a worker
 - When a client, facility or report is being transferred to a worker
 - When shared access is granted
 - When a worker receives or grants read-only access
 - When the a worker is granted temporary access
 - An alert will be sent to the primary worker when temporary access is granted to another worker

STFL - Staff List

CAFSSTFL		STAFF LIST		06/20/2006		14:47	
USER ID : C84142						PAGE NO: 1	
TO SELECT, ENTER A=ALERTS, C=CLIENT CASELOAD OR F=FACILITY CASELOAD							
SEL	WORKER ID	NAME	CLIENTS	R/R'S	FACILITIES	ALERTS	
-	C7TR01	OFFICER, PROBATION	5			2	
-	C7TR02	TWO, TRAINER	2				
-	C7TR03	THREE, TRAINER					
-	C7TR04	FOUR, TRAINER					
-	C7TR05	FIVE, TRAINER					
-	C7TR06	SIX, TRAINER					
-	C7TR07	SEVEN, TRAINER					
-	C7TR08	EIGHT, TRAINER					
-	C7TR09	NINE, TRAINER					
-	C7TR10	TEN, TRAINER					
-	C7TR11	ELEVEN, TRAINER					
-	C7TR12	TWELVE, TRAINER					
-	C7TR13	THIRTEEN, TRAINER			2		
-	C7TR14	FOURTEEN, TRAINER					
-	C84142	HOLLING, PAULA	1		19	1	
PATH: █							

- The Staff List displays all of the workers under a supervisor and the total number of clients, reports, facilities and alerts in each of their caseloads
- All data fields are display only
- If a worker line is selected with a “C”, that workers CSLL (Caseload List) screen will be displayed
- If a worker line is selected with a “F”, that workers FCLL (Facility Caseload List) screen will be displayed
- If a worker line is selected with an “A”, that workers ALER (Alerts) screen will be displayed

USMD - User Maintenance Detail

```
CAFSUSMD          USER MAINTENANCE DETAIL          03/16/2010    10:28
USER ID : CS4566  MODIFY

      USER ID          : CS4566          START DATE: 01/01/1995
                                     TERMINATION DATE: 99/99/9999
      FIRST NAME       : MARY
      MIDDLE NAME      : CLARE
      LAST NAME        : REYNOLDS

      STAFF TYPE       : SMN  HELP DESK/CAPS STAFF
      SUPERTASKS       : N    DAY CARE ACCESS: N

      SUPERVISOR ID    : C84720  LAMKA, VERONICA
      SERVICE REGION   : 4  SOUTHWESTERN REGION
      RGN ACCESS       : N
      SERVICE COUNTIES : 025
      LOCATION         :

      TITLE            : NORTHROP GRUMMAN SYS TRAINER
      TELEPHONE        : (406) 443-8400  EXT:
      CONTACT COUNTY   : 025  LEWIS & CLARK
      EMAIL ADDRESS    : MARY.REYNOLDS@NGC.COM

SHFT+F5=SATD

                                     PATH:
```

- This screen can be accessed in order to view identifying worker information if all you have is that worker's USER ID
- With the cursor in the USER ID field, type in the C# of the worker. The following information will be displayed
 - Worker's name and staff type
 - Worker's supervisor and service region/counties
 - Worker's phone number and contact county
 - Worker's email address
- This screen is also used to identify start and termination dates for worker's on the system

USML - User Maintenance List

```
CAFSUSML          USER MAINTENANCE LIST          06/20/2006   14:49
USER ID : C84142                                     PAGE NO:   1

REGION :          COUNTY :
STAFF TYPE :          STARTING LAST NAME :
DISPLAY THE WORKER HISTORY FOR USER-ID :
TO SELECT, ENTER I=INQUIRE, M=MODIFY OR D=DELETE
SEL USERID  NAME                STAFF TYPE      RGN COUNTY-----  PHONE
- C7TR08    EIGHT, TRAINER      CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR18    EIGHTEEN, TRAINER   CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR11    ELEVEN, TRAINER     CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR15    FIFTEEN, TRAINER    CBW BSA STAFF    9 098 BSA COUNTY
- C7TR05    FIVE, TRAINER       CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR04    FOUR, TRAINER       CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR14    FOURTEEN, TRAINER   CWA COUNTY OFFIC 4 025 LEWIS & CL
- C84142    HOLLING, PAULA       SPH CENTRALIZED  9 073 STATE OFFI 442-6550
- C86100    KOENIG, KELLY          CAA REGIONAL ADM 4 025 LEWIS & CL
- C7TR09    NINE, TRAINER        CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR19    NINETEEN, TRAINER      CWA COUNTY OFFIC 4 025 LEWIS & CL
- C7TR01    OFFICER, PROBATION     CCO YOUTH COURT  8 074 1ST JUDICI
- CS4566    REYNOLDS, MARY          CAC COUNTY OFFIC 4 025 LEWIS & CL 443-8411
- C7TR07    SEVEN, TRAINER      CWA COUNTY OFFIC 4 025 LEWIS & CL

                                     PATH: █
```

- This screen can be accessed in order to view identifying worker information
- You can search for a worker by
 - Region
 - County
 - Staff type
 - Worker's last name
 - Worker's USER ID
- You have the ability to INQUIRE only on this information. Placing an "I" on the SELECT line next to the worker's USER ID will take you to USMD (User Maintenance Detail) and will display additional worker information

MIPD – Minors in Possession Detail

```
CAFSMIPD          MINORS IN POSSESSION DETAIL          06/20/2006  14:50
USER ID : C84142  MODIFY          PAGE NO: 1
CAPS ID : 00002112  00 NAME: HARRIS, MELISSA

LAST NAME: HARRIS          FIRST: MELISSA          MIDDLE:
-----ADDRESS-----
LINE 1 : 202 NORTH CHESTNUT          BIRTHDATE: 04/19/1989 AGE: 17
LINE 2 :          SEX : F HEIGHT:          WEIGHT:
CITY : HELENA          HAIR: BLN BLONDE
STATE : MT ZIP CODE : 59601 -          EYES: BRN BROWN
COUNTY : 25 LEWIS & CLARK

-----
TO SELECT ENTER A=ADD, D=DELETE, M=MODIFY TOTAL MIP CITATIONS ON RECORD: 1

CITN   CITATION   TICKET   DATE   COURT YTH   SENT   AGE AT
SEL CNTY   DATE   ISSUED BY   OFN   CONVICTED   APPEARED   CD   CITN
- 25 05/01/2006 CPOLICE MIP1 05/23/2006 YC07401 GU1 17
- NOTES:
- NOTES:
- NOTES:

PATH:
```

- This screen displays all MIP citations where the youth was convicted.
- If an MIP detail is entered for an individual that is assigned to a worker as a client or as an open juvenile on a probation referral, the worker will receive an alert notifying them of the new information
 - CO2003 = MIP Citation Issued on “DATE” for CAPS ID “ID#”
- Information on this screen is entered by Chemical Dependency/Court Staff workers. The assigned worker will only be able to view the records on the list. No modify of the details will be allowed
- Once an MIP detail is updated on this screen, the system will create a “L” type (law enforcement) address type on the ADDL screen. These address types cannot be modified or deleted

PIGD - Provider Information (General) Detail

```
CAFSPIGD      PROVIDER INFORMATION (GENERAL) DETAIL      02/05/2007 09:30
USER ID: CS4566                                     PAGE: 001
PROV NO: 0007001 006      PROV NAME: YOUTH HOMES INC.
FACIL NAME: DAN FOX FOSTER CARE AND ADOPTION PROG ABRV NAME: YHI
ADDRESS      LINE1: 550 N CALIFORNIA ST      PHONE #: 406 721-2754
              LINE2:
              CITY : MISSOULA      STATE: MT      ZIP: 59802 3913
PROVIDER CONTACT NAME: BIRNBAUM      GEOFF
ACTIVE LICENSES      STS      ASSIGNED WORKER      AVAILABLE SERVICES
CPA CHILD PLACING      REG      C76324      JENNESKENS, FRED      SNAAS ADOPTION COSTS-ADOPT
                                                                SPART PARENTING TRAINING
                                                                STRKS TRACKER SERVICES
                                                                SUPFC UNDERPD FFC CORRECTI
                                                                SYACT YOUTH ACTIVITIES
                                                                PFRS1 FOSTER FAMILY CARE -
                                                                PFTB1 FOSTER FAMILY CARE -
                                                                PFTHR FOSTER FAMILY CARE-T
                                                                PFTL2 FAMILY FOSTER CARE-T
                                                                PTAL1 THERAPEUTIC FOSTER C
                                                                PTXL2 THERAPEUTIC FOSTER C
                                                                SRETF THERAPEUTIC FOSTER C

HIGHLIGHTED SERVICES ARE NOT ASSOCIATED WITH A FACILITY TYPE      PATH: █
```

- This screen displays general information about a provider/facility in the CAPS system
- Information will be displayed for ACTIVE LICENSES only and for those services not associated with a specific license
- Information displayed includes the following:
 - Address
 - Provider contact information
 - Facility type and license status
 - Assigned licensing worker
 - Services provider/facility can provide

CAPS Notes and DocGen System

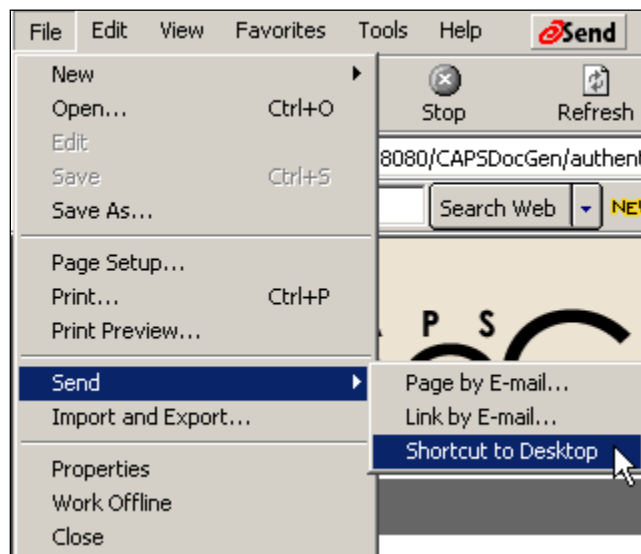
There are a couple of important items to note:

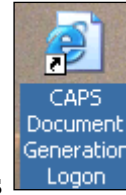
- **The URL for CAPS DocGen is <https://js.hhs.mt.gov:8445/CAPSDocGen/> This URL is case-sensitive, so you must enter it EXACTLY as shown.**
- In order to use CAPS DocGen, you must have Adobe Reader loaded on your machine. If you do not already have Adobe Reader, this download is free and can be accessed through the Adobe website (www.adobe.com). If you have questions or concerns about downloading this software, contact your supervisor or network staff person.
- You DO NOT have to currently be in the CAPS system in order to run documents or to save or retrieve notes. Documents and notes are no longer “screen” specific.
- PLEASE log out following the logout procedures provided in this document.
- Use the menu options on the left of the screen or the link options on the bottom of the screen. **Do not use the BACK or FORWARD buttons to navigate in CAPS DocGen.**
- Should you receive any errors while attempting to process a document, store or retrieve notes, please contact the CAPS Help Desk as soon as possible.

Creating a Desktop Shortcut

The easiest way to access the CAPS DocGen system is to select the icon that will display directly on your desktop. This way, when you select that icon, the CAPS DocGen Logon page will open and you don't have to keep trying to remember the URL! If you do not already have a CAPS DocGen icon, you can create one following these steps:

- Access the CAPS DocGen Logon page, click on FILE, select SEND, and select SHORTCUT TO DESKTOP.





- That's all there is to it! The icon may look something like this . From now on, you can access the CAPS DocGen Logon screen by double-clicking this icon.
- If you are unable to create a shortcut following this format, or this option isn't available to you, please contact the DPHHS Help Desk at 444-9500. They will be able to help you create this shortcut.
- If you prefer, you may also add the CAPS DocGen Logon screen to your list of favorites by clicking FAVORITES, then selecting ADD TO FAVORITES.



Logging On

Before you can access the system, you must logon first. To logon, enter your mainframe USER ID and PASSWORD (this is the same ID and password you use to log onto the CAPS system. Once you have entered your ID and password, click on the Submit button or simply press your Enter key.

A screenshot of the 'Please Logon' screen. It has a title bar that says 'Please Logon'. Below the title bar, it says 'Please log in to the system.' in red. There are two input fields: 'User Id:' with the value 'cs4566' and 'Password:' with the value '*****'. Below the password field is a 'Submit' button.

If you experience any problems logging in to the system, there is a “contact the CAPS Help Desk” link to the right of the logon fields. When you click this link, Outlook will automatically open an e-mail message to the CAPS Help Desk. Be sure to enter what the problem is and/or any error messages you are receiving before you send your message so the problem can be researched more effectively.

Once you log on, the system will display the WELCOME page. From there, you can select any of the options available in the CAPS DocGen system.

Once you log on, the system will display a time clock, letting you know how much longer you have before the system will time out.

A rectangular box with a black border containing the text 'Time Remaining: 89:56' in red.

General Screen Information

On the left hand side of each screen you should see a menu that looks like this:

Home
Create DocGen
Save Notes
Retrieve Notes
Provider Labels
Logout

Each option will be described in more detail in separate sections, but here is a brief summary:

- HOME – selecting this button will return you back to the CAPS DocGen Home/Welcome page.
- CREATE DOCGEN – selecting this button will take you to the Document Generation page where you will select the document you wish to generate.
- SAVE NOTES – selecting this button will take you to the Save Notes page where you will identify the notes association and file location of the notes document you saved previously.
- RETRIEVE NOTES – selecting this button will take you to the Retrieve Notes page where you will identify the notes association and appropriate ID number.
- PROVIDER LABELS – selecting this button will take you to the Provider Labels Request page where you can generate mailing labels for licensed facilities (this function will primarily be used by provider licensing staff.)
- LOGOUT – selecting this button will initiate your logoff from the CAPS DocGen system. **NOTE: it is important that you click the logout button when you are ready to leave this system. DO NOT simply click the “X” or select FILE, CLOSE.**

On the bottom of each screen, you should see options that look like this:

DocGen Home	 	Log Out	 	Contact CAPS Help Desk
About CAPS DocGen (PDF)	 	CAPS Online	 	CAPS Training Web Site

Some of these options perform the same function as the buttons on the left side of the screen.

Others provide you with quick access to other websites. Here is a brief summary:

- DocGen Home – selecting this option will return you back to the CAPS DocGen Home/Welcome page.
- Log Out – selecting this option will initiate your logoff from the CAPS DocGen system. **Again, it is important to select either the logout button on the menu, or the logout link on the bottom of the screen when you are ready to leave this system.**
- Contact CAPS Help Desk – selecting this option will cause Outlook to automatically open an e-mail message to the CAPS Help Desk.

- About CAPS DocGen (PDF) – selecting this option will open a document that contains the information you are reading right now!
- CAPS Online – selecting this option will open a separate browser window where you can log into CAPS using online Attachmate. For further information on how to access CAPS online, contact the ITSD Help Desk at 444-2000 or isdcustsup@state.mt.us.
- CAPS Training Web Site – selecting this option will open a separate browser window where you can access information like the CAPS training schedule, CAPS training manuals, and the CFSD policy manual.

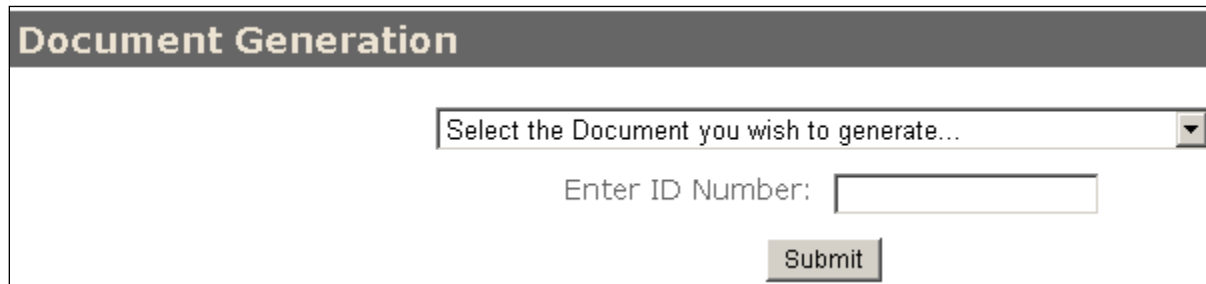
Home Button

Selecting the Home Button from the menu (or the DocGen Home link at the bottom of the screen) will return you back to the CAPS DocGen Home/Welcome page. **Do not use the BACK button.**

If you see **Welcome Mary Reynolds** (except with your name), you know you are on the Home/Welcome page.

Create DocGen Button

This is the button you will select when you want to create documents (for example, the Letter to the Perpetrator, Provider License, Foster Care Review or Juvenile Offense Record.) When you select the Create DocGen button, you will be taken to a screen where you should see the following:



The screenshot shows a web interface titled "Document Generation". It contains a dropdown menu with the text "Select the Document you wish to generate..." and a small downward arrow. Below the dropdown is a text input field labeled "Enter ID Number:". At the bottom right of the form is a button labeled "Submit".



You will no longer have access to every document available through this process. Document access is now associated to your staff type. What that means to you is, when you click the “Select the Document you wish to generate...” drop down list, you will only see those documents you have access to. For example, if you are a social worker, you will not see any of the juvenile probation documents on your list, and if you are a probation officer, you will not see any of the provider licensing documents on your list.

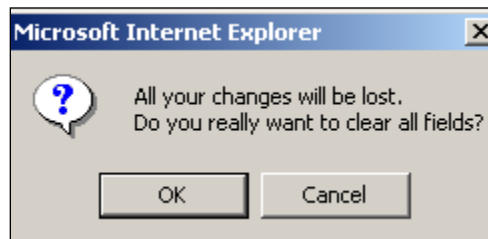
- If you believe you should have access to a specific document, and it is not on your list of available documents, please contact the CAPS Help Desk. Identify why you need access to this document and request that the document be added to your staff type.

Based on the document that you select, the text associated to the ID Number field will change. Person, Client or Juvenile related documents will require a CAPS ID, Report related documents will require a R/R number, and Provider related documents will require a Provider number. Once you select the document you wish to generate, the system will begin the process. One of the following will happen depending on the document you selected:

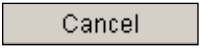
- Adobe will create the document for display in a separate browser window (depending on the version of Adobe Reader you have, you may be asked if you would like to “Open” or “Save” the document. Select “Open”.)
- The system will display a page of questions that must be answered before the document can be created.

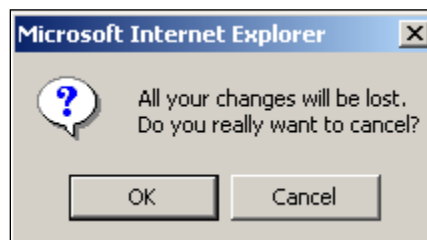
If the system displays a page of questions, there will be three options available at the bottom of the page.

- Click  when you are finished answering the questions and you wish to proceed with generating the document.
- Click  if you would like to clear all of your answers and start again. You will receive the following message:



If you click OK, the question page will be refreshed and you can begin answering the questions again.

- Click  if you would like to quit processing this document. You will receive the following message:



If you click OK, you will be returned to the Document Generation page.

The document will not continue processing until you have answered all of the required questions. If you missed any required questions/answers, you will be taken back to the top of the question page, and what is required will be listed in red like this:

Please enter the start date for travel.

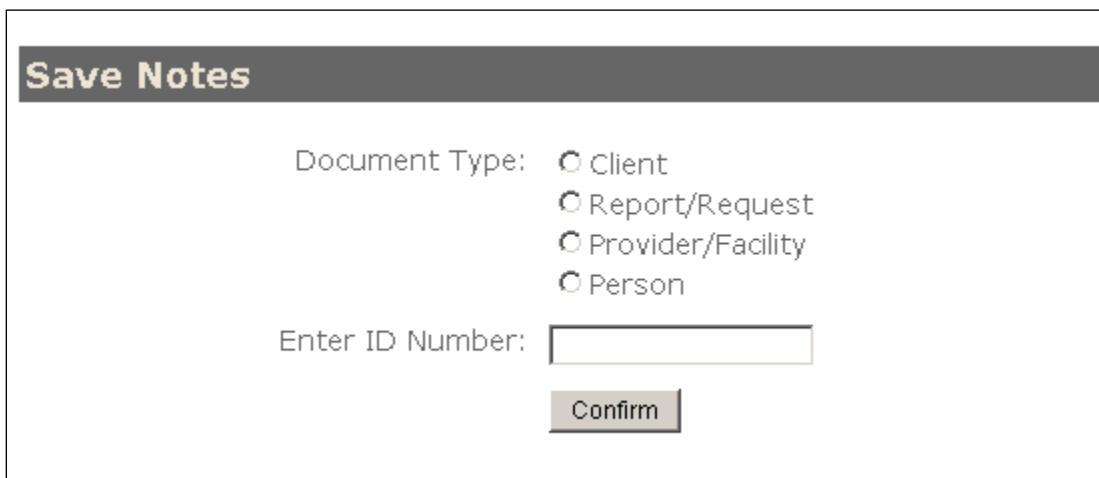
Please enter the return date.

It is **important** that any information that you want the document to pull from the CAPS system be entered **in the CAPS system**. Because the finished document will be displayed in PDF format, you will not have ability to modify the document before printing.

If you select a document that calls for notes to be retrieved, the system will display the list of all associated notes. You must open and print each note file separately in addition to the document you are processing.

Save Notes Button

This is the button you will select when you want to associate notes to a person, client, report/request, provider/facility or juvenile probation referral. When you select the Save Notes button, you will be taken to a screen where you should see the following:



Save Notes

Document Type: ☐ Client
☐ Report/Request
☐ Provider/Facility
☐ Person

Enter ID Number:


There are a couple of important things to remember regarding the Notes feature:

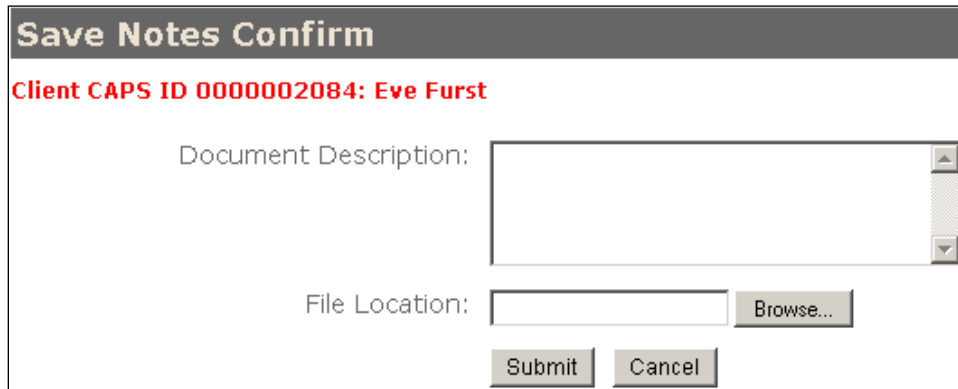
- Notes are no longer associated to a specific screen in the CAPS system.
- Notes no longer require the use of WordPerfect word processing software.
- You can save your notes initially wherever you would like (for example, on disk, in a shared directory or in your C: directory.)

You can type your notes using any word processing software. As a matter of fact, you don't have to use any word processing software at all. For example, if you have a spreadsheet in Excel, or a downloaded picture that you would like to attach as notes, you can!

- **IMPORTANT NOTE:** Regardless of the program that you use to save your notes, be sure to use the standard extensions that are assigned to these documents (for example, Word uses .doc, WordPerfect uses .wpd, Excel uses .xls). If you create "special"


extensions (for example, .123 or .bob) the system does not know what program was used to create the document and will be unable to open it when it is selected for retrieval.

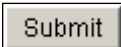
When you are ready to save your notes to CAPS, select the appropriate Document Type, enter the appropriate ID number, and then click . You should then be taken to a screen where you should see the following:



The image shows a 'Save Notes Confirm' dialog box. At the top, it says 'Client CAPS ID 0000002084: Eve Furst' in red. Below this is a 'Document Description:' label followed by a large text input field. Underneath that is a 'File Location:' label followed by a smaller text input field and a 'Browse...' button. At the bottom of the dialog are 'Submit' and 'Cancel' buttons.

This is the Save Notes Confirm box. You will be able to view exactly who or what the notes will be associated with before you attach them. Make sure you are associating the notes to the correct person, client, provider, report or juvenile referral before submitting your file!

Enter a Document Description (you have space to enter up to 200 characters – this is to be considered a “title” for your notes), and then enter the File Location for your document (you can click on the  button to search for your document if you are unsure of the location.)

Click . If the notes were stored, you should see message “File successfully uploaded” displayed in red at the top of the screen.

Retrieve Notes Button

This is the button you will select when you want to retrieve notes associated to a person, client, report/request, provider/facility or juvenile probation referral. When you select the Retrieve Notes button, you will be taken to a screen where you should see the following:

Retrieve Notes

Document Type: ☐ Client
☐ Report/Request
☐ Provider/Facility
☐ Person

Enter ID Number:

To retrieve the notes associated with a person, client, report/request, provider/facility or juvenile probation referral, select the appropriate document type and then the appropriate ID number.

Click . The system will search for any notes associated to the document type and ID number that you have entered. If there are no notes, you will receive the following message: “there are no notes stored for the requested ID.” If there are notes, the system will display a list that will look similar to this:

Download Document(s)			
Type: Client , ID number: 00001005			
Click the filename to download:			
Date	Filename	Description	Worker
04/21/2004	autotab_example.txt	This is a cursor test	Mcrae, Scott
04/08/2004	This a save test.doc	save test	Holling, Paula
04/02/2004	Hardware Software Settings.doc	d	Miller, Todd
03/30/2004	javaProxySetting.txt	test	Scheetz, Gerry

This list will display the date the notes were saved, the filename, a description of the notes, and the name of the worker that saved the notes.

To open a document, simply click on the Filename and the document will open in the program that it was saved in. (The exception to this is documents saved in WordPerfect (.wpd extension) will be opened in Word.)

Provider Labels Button

This is the button you will select when you want to create mailing labels for selected facility types. When the Provider Labels option is selected, the CAPS Provider Labels Request page will display.

The CAPS Provider Labels Request page looks like this:

CAPS Provider Labels Request		
LABELS ARE ONLY PRINTED FOR PROVIDERS WITH ACTIVE LICENSES AND A STATUS OF: APP(APPROVED), PRO(PROVISIONAL), REG(REGULAR), OR RES(RESTRICTED)		
Select	Region/County	Description
<input type="radio"/>	073 - State Office	COUNTY PROVIDERS - REQUEST FACILITY TYPES
<input type="radio"/>	9 - State Office Region	REGION PROVIDERS - REQUEST FACILITY TYPES
ENTER FACILITY TYPE CODE:		
	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	
<input type="button" value="Reset"/> <input type="button" value="Submit"/>		

Some important things to note when submitting a labels request:

- Labels will only be created for facilities with ACTIVE licenses. If a license is expired, terminated or suspended, a label will not be created.
- Labels will only be created for facilities with a STATUS of Approved (APP), Provisional (PRO), Regular (REG) and Restricted (RES). If a license has a status other than the four listed, a label will not be created (for example - “intending to be licensed” kinship licenses will not get a label.)
- The facility address used for the label will follow a hierarchy (if the facility has multiple address types listed on PADL.) This hierarchy is Mailing, Residential and Warrant. If a facility has no address on PADL, a label will be created that contains NO ADDRESS for the facility name and facility number.
- Labels for **adoption** facilities (ADP or CAA facility types) can only be requested by workers with a SPG (Program Bureau: Foster Care Specialist), SPE (Program Bureau: Adoption Specialist) or CRA (Regional FRS Supervisor) staff type.
- Labels for **tribal** facilities (TFA, TFF, TFN, TGK, TGN, TKI and TRA facility types) can only be requested by workers with a SPG (Program Bureau: Foster Care Specialist), SPE (Program Bureau: Adoption Specialist) or Tribal staff type.

Select Options

Select	Region/County	Description
<input type="radio"/>	073 - State Office	COUNTY PROVIDERS - REQUEST FACILITY TYPES
<input type="radio"/>	9 - State Office Region	REGION PROVIDERS - REQUEST FACILITY TYPES

Your contact REGION and COUNTY will automatically be defaulted.

- Either the County or Region radio button must be selected in order to generate a labels request.
- County and Region are both drop-down lists and the county/region can be changed as necessary based on the labels needed (following security edits as identified above.)
- If a County or Region is not selected, you will receive an error message when you attempt to submit your request that a County or Region is required.

ENTER FACILITY TYPE CODE:	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

No facility types will automatically be defaulted.

- Facility Type Code is a drop-down list and at least one facility type must be selected in order to generate a labels request.
- Up to a maximum of five facility types can be selected.
- If at least one Facility Type Code is not selected, you will receive an error message when you attempt to submit your request that a Facility Type Code is required.

<input type="button" value="Reset"/>	<input type="button" value="Submit"/>
--------------------------------------	---------------------------------------

If you wish to clear all entries made on the labels request page before submitting, you can click the RESET button.

When you are ready to submit your request, you can click the SUBMIT button. When the submit button is selected, the CAPS Provider Label List will display.

- If there are no facilities matching the request, you will receive an error message when you attempt to submit your request that no providers were found matching the selected criteria.

CAPS Provider Labels List

The CAPS Provider Labels List page looks like this:

CAPS Provider Labels List

Label Request For: 025 - Lewis & Clark County Providers **Facility Types:** YFH

Instructions:

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.

OR

Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, [Click Here!](#)

Back PDF Labels Mail Merge

* You can change how the list is sorted by clicking on the column header. (Default is Provider Name Ascending)

<u>Toggle Select</u>	Provider ID	Provider Name ▲	Facility Type	Address Code	Address 1	Address 2	City	State	Zip	County
<input checked="" type="checkbox"/>	0001115001	Adoption Home 1	YFH	R Residence (physical)	2405 Colonial Dr		Helena	MT	59601-4980	Lewis & Clark
<input checked="" type="checkbox"/>	0001004001	Just Like Home	YFH	R Residence (physical)	1234 Villard		Helena	MT	59601	Lewis & Clark
<input checked="" type="checkbox"/>	0001116001	Montana Home	YFH	R Residence (physical)	3395 C B Loop		Helena	MT	59602-9598	Lewis & Clark
<input checked="" type="checkbox"/>	0001152001	Reynolds Mary	YFH	R Residence (physical)	1311 Bighorn Rd		Helena	MT	59602-7612	Lewis & Clark

This page will display the list of providers who match the criteria entered on the CAPS Provider Labels Request page.

Label Request For: 025 - Lewis & Clark County Providers **Facility Types:** YFH

Instructions:

- Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.
- Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types.

OR

Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, [Click Here!](#)

The top part of the page will display the criteria used to generate the list (in this case, I submitted a request for all active YFH (Youth Foster Home) facilities in County 25 (Lewis & Clark).

Instructions for selecting providers and how to use the PDF labels and Mail Merge features are also listed for you.

- **NOTE:** Creating labels using the PDF Labels option or the Mail Merge option are heavily dependent on additional settings on your personal computer. If there are problems printing the labels created using CAPS DocGen, it may have to do with those settings in Adobe (PDF) or Word (Mail Merge). Please keep that in mind when creating labels!

* You can change how the list is sorted by clicking on the column header. (Default is Provider Name Ascending)

Toggle Select	Provider ID	Provider Name ▲	Facility Type	Address Code	Address 1	Address 2	City	State	Zip	County
<input checked="" type="checkbox"/>	0001115001	Adoption Home 1	YFH	R Residence (physical)	2405 Colonial Dr		Helena	MT	59601-4980	Lewis & Clark
<input checked="" type="checkbox"/>	0001004001	Just Like Home	YFH	R Residence (physical)	1234 Villard		Helena	MT	59601	Lewis & Clark

The list will display all providers who match the criteria entered on the CAPS Provider Labels Request page. Information displayed includes, Select Option, Provider ID, Provider Name, Facility Type, Address Code, Address 1, Address 2, City, State, Zip and County.

- All facilities will default as selected for a label. You can click TOGGLE SELECT to UNSELECT all facilities. You can also select/unselect individual facilities by clicking the check box next to each facility.
- The list will automatically be sorted in ascending order by PROVIDER NAME. You can change the sort order of the list by clicking on any column header.

Back	PDF Labels	Mail Merge
------	------------	------------

Clicking the BACK button will return you to the CAPS Provider Labels Request page.

Clicking the PDF Labels button will take you to the CAPS Provider Labels Layout page.

Clicking the MAIL MERGE button will create a merge file arranged in table format. This file will contain the address information for the providers checked on the list.

PDF Labels

The CAPS Provider Labels Layout page looks like this:

CAPS Provider Labels Layout	
Select Label Layout	
Layout:	<input type="radio"/> Avery 5160 address labels (3 x 10 columns) <input type="radio"/> Avery 5162 address labels (2 x 7 columns) <input type="radio"/> Avery 5163 address labels (2 x 5 columns)
Back	Continue

You will have the option of selecting one of three different label sizes. You must select one of the layouts in order to continue processing your labels request. If a Layout is not selected, you will receive an error message when you attempt to submit your request that a Label Layout is required.

- Avery 5160 address labels. These labels contain sheets of 30 labels (3 across and 10 down.) These labels would be appropriate for regular letter sized envelopes.
- Avery 5162 address labels. These labels contain sheets of 14 labels (2 across and 7 down.) These labels would be appropriate for larger envelopes.
- Avery 5163 address labels. These labels contain sheets of 10 labels (2 across and 5 down.) These labels would be appropriate for larger envelopes or packages.

Back

Continue

Clicking the BACK button will return you to the CAPS Provider Labels List page.

Clicking the CONTINUE button will take you to the CAPS Provider Labels Starting Position page.

The CAPS Provider Labels Starting Position page looks like this:

CAPS Provider Labels Starting Position for Avery 5160

Select Label Starting Position

<input checked="" type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3
<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> 6
<input type="radio"/> 7	<input type="radio"/> 8	<input type="radio"/> 9
<input type="radio"/> 10	<input type="radio"/> 11	<input type="radio"/> 12
<input type="radio"/> 13	<input type="radio"/> 14	<input type="radio"/> 15
<input type="radio"/> 16	<input type="radio"/> 17	<input type="radio"/> 18
<input type="radio"/> 19	<input type="radio"/> 20	<input type="radio"/> 21
<input type="radio"/> 22	<input type="radio"/> 23	<input type="radio"/> 24
<input type="radio"/> 25	<input type="radio"/> 26	<input type="radio"/> 27
<input type="radio"/> 28	<input type="radio"/> 29	<input type="radio"/> 30

Please Follow These Printing Tips:

- In your Adobe PDF printing options:
 - If applicable to your version of Adobe Reader, make sure you set Page Scaling to None, and UNcheck Auto-Rotate and Center.
OR
 - If applicable to your version of Adobe Reader, make sure you UNcheck the Shrink Oversize Pages to Paper Size option.
- To prevent label waste, make sure you print a test page first, and see if the alignment is correct, before you print on a label sheet. If alignment is incorrect, try printing on a different printer.
- If correct printing alignment cannot be achieved, please go back to the CAPS Provider Labels List page and choose the Mail Merge option.

Back

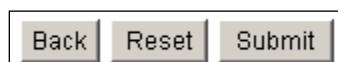
Reset

Submit

This page will allow you to select the starting position for your labels, based on the type of label you selected (5160, 5162 or 5163.) This is so you can utilize partially used sheets of labels and not have any label waste! Select the radio button in front of the desired starting position and that is where the first label will print.

This page also contains some PRINTING TIPS for PDF labels. **Please pay close attention to these tips as they may affect the result of your printed labels.**

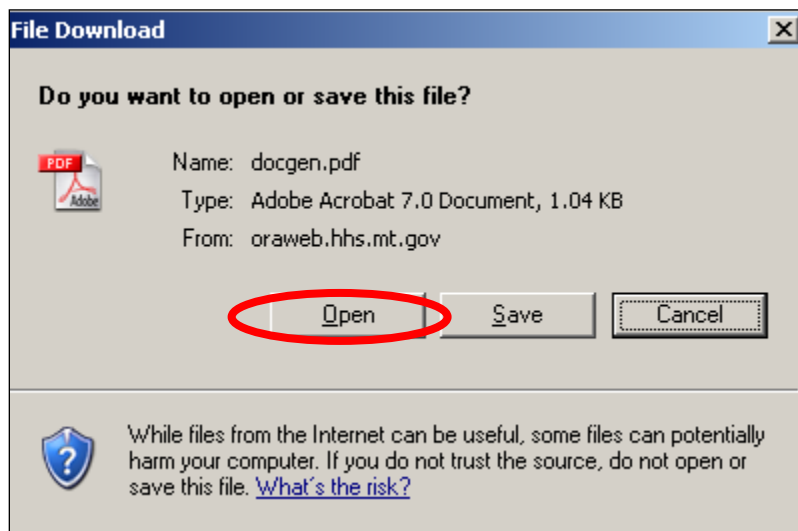
- Setting your page scaling to none and unchecking auto-rotate and center is something you will need to verify each time you print labels in the PDF format.
- Where these settings are located are dependent on the version of Adobe Reader you have on your machine.
- It is always recommended that you print a “test page” (print your PDF document on regular paper) before you attempt to print on an actual sheet of labels. This will allow you to verify alignment.



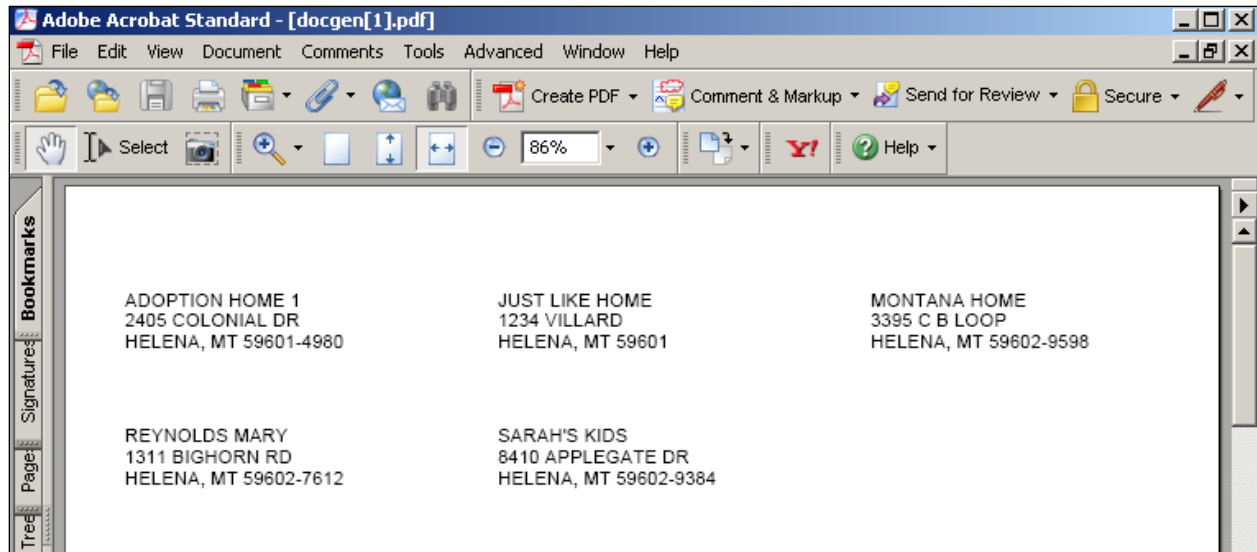
Clicking the BACK button will return you to the CAPS Provider Labels Layout page.

Clicking the RESET button will set the label starting position back to “1”.

Clicking the SUBMIT button will create the PDF document for your labels. When you click the SUBMIT button you will receive a File Download box that looks like this:



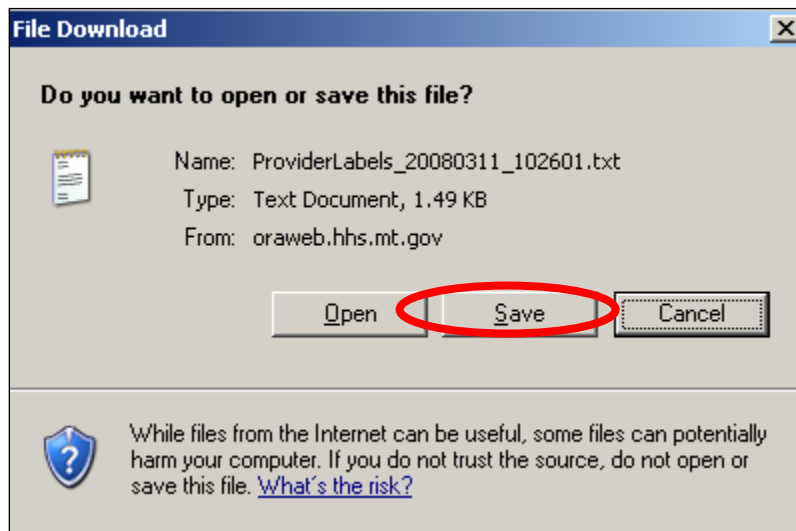
Click OPEN to generate the PDF document. You should then receive a document that looks similar to this (again, based on the label type you selected):



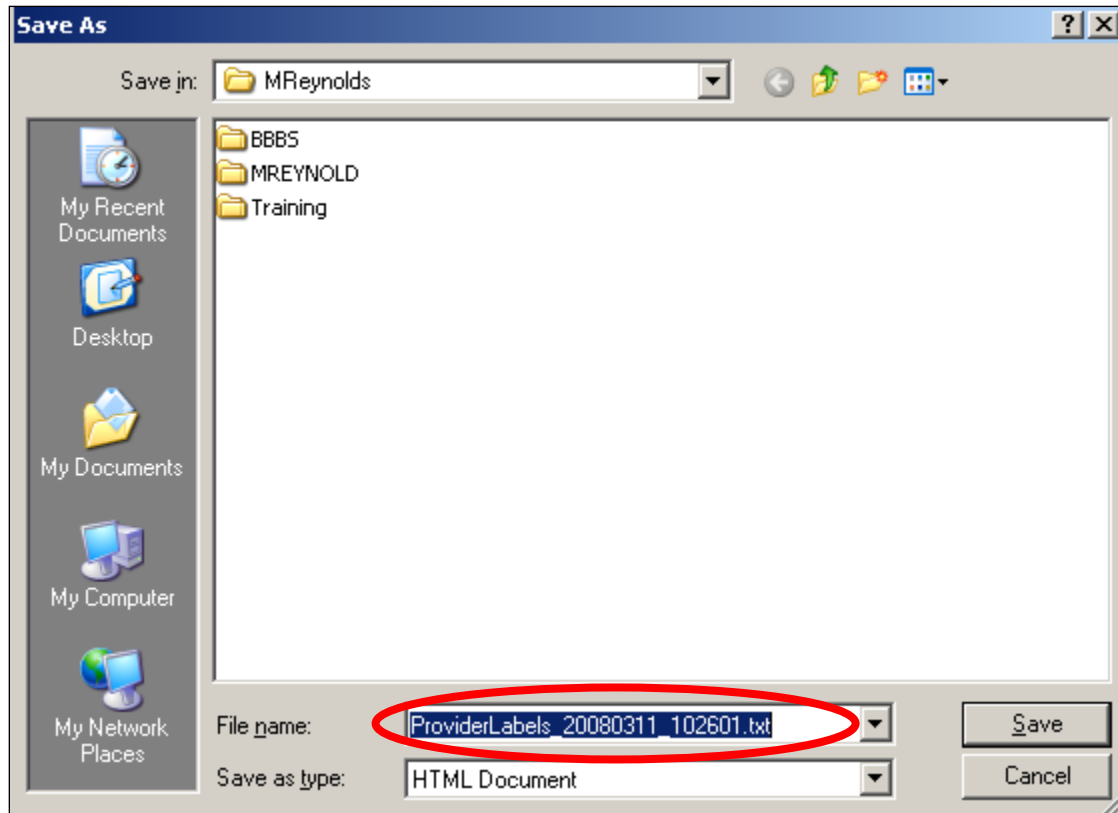
Once the PDF document has been created, you can print your labels just like you print any other document.

Mail Merge

When you click the MAIL MERGE button on the CAPS Provider Labels List page, you will receive a File Download box that looks like this:



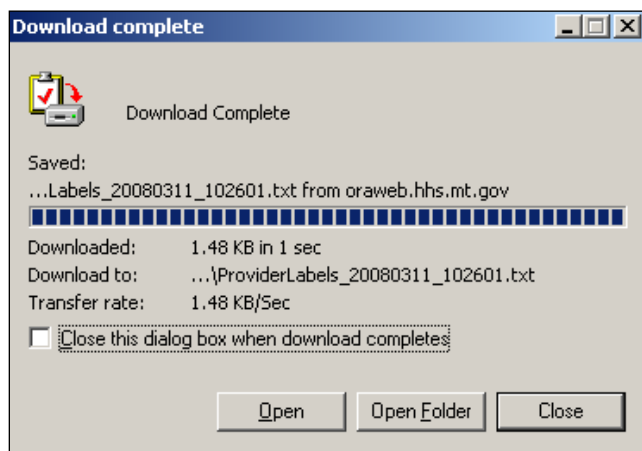
Click SAVE to save the file to your computer. You should receive a Save As box that looks similar to this:



When the Save As box appears, click SAVE. You can store the document wherever you typically save files on your computer. This may be different for each worker.

- The file will be saved as a .txt file – do not change the file extension as this can affect the ability to merge the file into your main document later.
- The file name will default to “ProviderLabels_YYYYMMDD_HHMMSS.txt” where YYYYMMDD = current date and HHMMSS = current time.

When you click SAVE, you may receive a Download Complete box that looks like this:



You can click CLOSE at this point. You will use the file later when you perform the Mail Merge in Word.

- For assistance with using the Mail Merge feature in Word, click on the “click here” link located in the instructions area of the CAPS Provider Labels List page

Label Request For: 025 - Lewis & Clark County Providers Facility Types: YFH
Instructions: <ul style="list-style-type: none">• Check each provider to include in the label process. You may click on Toggle Select to select/deselect all labels.• Click PDF Labels button to create and download PDF labels for printing on specified Avery Label types. <p>OR</p> <p>Click Mail Merge to download and save a data file for creating labels using Microsoft Mail Merge. For help with Microsoft Mail Merge, Click Here!</p>

Logout Button

This is the button you will select when you are finished using the CAPS DocGen system. **It is important that you click the logout button when you are ready to leave this system. DO NOT simply click the “X” or select FILE, CLOSE.**

When you select the Logout button, you will be taken back to the Logon screen where you should see the following:

Please Logon	
Successfully logged out of system! Please close all browsers to complete this process.	
User Id:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Submit"/>	

Once you receive this message, then you can click the “X” or select FILE, CLOSE. This will completely log you out of the CAPS DocGen system.